



Candise C. Holmlund, CFA, CFP®, TEP, AEP® has almost 40 years of experience in financial markets, with an extensive career in both investing and advising. President and Founder of Alaethes Wealth LLC, Candise started the firm in order to provide a boutique experience to clients through a very personal, comprehensive, and collaborative relationship. Prior to founding Alaethes Wealth, Candise was a senior partner for over 20 years at Weatherly Asset Management, LP in Del Mar, CA, where she managed many of the firm's largest and most complex client relationships. At Weatherly she was also responsible for oversight of the firm's option strategy.

Candise specializes in comprehensive wealth management, including financial, tax, and estate planning. Before joining Weatherly, Candise was Vice President, Manager of Trading and Investments at First Interstate Investment Services in Los Angeles, where she managed a \$5 billion fixed income portfolio for large public pension funds, including Cal PERS and Cal STERS. She also served as a senior member of the First Interstate investment committee. Prior to joining First Interstate, Candise traded fixed income securities for Merrill Lynch Capital Markets in the Institutional Sales and Trading Division. In this role she was responsible for government securities, futures, and derivative products coverage to institutional investors. In a previous role at Merrill Lynch, Candise specialized in restricted stock sales and option execution for key officers of Silicon Valley companies.

Candise is a Certified Financial Planner (CFP)®, a Chartered Financial Analyst (CFA) charter holder, an Accredited Estate Planner (AEP)®, and has earned the Trust and Estate Practitioner (TEP) designation. She is a member of the CFA Institute, the CFA Society of San Diego and Nevada, the Estate Planning Council of San Diego, the North County Estate Planning Council, the Northern Nevada Estate Planning Council, The National Association of Estate Planners and Councils, and the Society of Trust and Estate Practitioners. Candise has passed the Series 3, Series 7, and Series 63 exams as well as life insurance and annuity exams. Candise serves as a frequent speaker or panelist on a variety of wealth planning forums and is utilized as a resource by local community foundations to educate others on philanthropy. She is recognized as a Subject Matter Expert for the Certified Financial Planner (CFP)® Board of Standards.

Candise has received the Five-Star Best Personal Wealth Manager Award from Five-Star Wealth Manager as seen in San Diego Magazine for 2011, 2012, 2013, 2014, 2015, 2016, 2017, 2018, 2019, and 2021. She was nominated as "Woman of the Year" in 2014, 2015, 2016, and 2017 by San Diego Magazine. She is a Distinguished Financial Advisor member of the Expert Network, and has been named to the 2016 and 2017, and 2018 SD 500, a list of 500 Influential Business Leaders as identified by the San Diego Business Journal. In 2015 and 2016 she was a finalist in the SDBJ *Women Who Mean Business* Awards.

Candise has residences in Las Vegas and Glenbrook, NV, and in Rancho Santa Fe, CA. She is active in community, civic, and charitable organizations. She currently serves on the board of A Step Beyond, an after-school enrichment program for disadvantaged youth, and is a member of Rady's Children's Hospital Foundation Estates and Trusts Council. She has served as Chair of the RSF Foundation Women's Fund and the Scripps Health Gift Planning Advisory Board, and as a member of the Scripps Hospital Foundation Board. Candise has also served on the Fidelity Wealth Advisor Solutions Advisory Board. She is married and has two sons.

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